cc: DM
cc: TDM
cc: SAM
cc: SFS

VIA ELECTRONIC MAIL

September 13, 1993

To: Division Managers
Region Managers

Re: Retention Policies

Dear Managers:

Attached are revised Retention policies. As information, this retention schedule is also included in the new on-line "Explain" system. Please let me know if you have any questions or need any further information.

Sincerely,

REBECCA

R.H. Fullton

RHF/jlh

Attachment

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Source: https://www.industrydocuments.ucsf.edu/docs/mykn0000

RETENTION POLICY

SIS

Current Contracts	As long as contracts are in effect.
SIS Data on Pay Register Monthly Retail Account Coverage Brand Distribution	Maintained in Historical Report Feature of SIS
Signed Preliminary Pay Register - Merchandising	1 year plus current
Variance Report (P/R) - Vending and Merchandising	1 year plus current
Form 7101's - which support Tax Information and Merchandising payment changes	1 year plus current
Vendor Information Sheet Form 3483	2 years plus current
Canceled Contracts for Shelf Display Plans and Counter Display Plans	3 years plus current
Additional SIS Reports	Retention at manager's discretion

TPS

Blue Tissue Copy of Drafts	6 months
TPS Office Expense Bills	7 years*
TPS Weekly Exception Report	6 months plus current
Division Office Property Tax Records	Permanent File - As long as office is active.

* 7 Year retention period is required by the Tax Department.

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RETENTION POLICY (cont.)

PERSONNEL/EXPENSE REPORTS

Weekly Expense and Payroll Reports	1 year plus current
Jobber Invoices (marked Deposit received)	3 years plus current
Cash Order Slip (Form 1145) (For Cash Sales To Retailers)	3 years plus current
Cash Display Slip (Form 3308) or Cash Order Slip (Form 1145) (For Displays paid by cash)	1 year plus current
Applications for Employment	2 years plus current
Automobile Accident or Loss Notice (Form 10322-U)	6 months plus current
Employee Performance Reviews	Permanently
Field Sales Applicant Flow Chart	2 years plus current
Listing of Job Vacancies Report or state reporting form (if provided)	1 year plus current
Disciplinary Documentations	For as long as the individual is employed

OTHER

FSOF Forms	1 year
Coded Correspondence	1 year plus current
All other reports	1 year plus current

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